

THE SERHOLD MODULE

- SERHOLD is the journal holdings section of DOCLINE.
- 1.4 million holdings statements; over 48,000 serial titles; over 3,000 libraries.
- Linked to LOCATORplus, NLM's catalog – <http://locatorplus.gov>.
- Every title in SERHOLD must be in LOCATORplus.

ACCESSING SERHOLD

- To enter the module, click on **SERHOLD**.
- There are 3 menu choices – **Search/Update/Add**, **Search/View** or **Reports**.
- **Search/Update/Add** is used for adding or updating your holding information.
- **Search/View** is used to find libraries that hold a particular title.
- **Reports** let you access the available SERHOLD reports.



SEARCH/UPDATE/ADD

- The **Search/Update/Add** screen shows two tabs: **SERHOLD** and **LOCATORplus**.
- The **SERHOLD** tab is divided in two sections: **Bibliographic Search/Update/Add** and **Search Limits**.
- The **LOCATORplus** tab allows the searching of LOCATORplus while imbedded in SERHOLD.

A screenshot of the DOCLINE web interface. At the top is the DOCLINE logo and tagline 'interlibrary loan request routing and referral system'. Below this is a navigation bar with links for REQUESTS, DOCUSER®, SERHOLD®, LD, HELP, HOME, Search/Update/Add, Search/View, and Reports. The main content area has two tabs: 'SERHOLD' (selected) and 'LOCATORplus'. Under the 'SERHOLD' tab, there are two sections: 'Bibliographic Search/Update/Add' and 'Search Limits'. The 'Bibliographic Search/Update/Add' section contains input fields for 'NLM Unique ID', 'ISSN', 'OCLC Number', 'Journal Title / Title Abbreviation'. The 'Search Limits' section contains checkboxes for 'Region', 'State/Province', 'Library Group', and 'My Library', along with a 'Lookup LIBID' button and a row of input boxes for 'Input LIBID (up to 10)'. At the bottom, there are fields for 'Volume(s) Owned' and 'Year(s) Owned'. A footer bar contains buttons for 'Search', 'Reset Bib Search', 'Reset Search Limits', 'Reset All', and 'Help'.

ADDING HOLDINGS TO SERHOLD

- To add a title to your SERHOLD data, remain in the **SERHOLD** Tab.
- In the **Bibliographic Search/Update/Add** section, enter **the NLM Unique ID, the ISSN, the OCLC Number, or the Journal Title or Title Abbreviation**. NOTE: The Title Abbreviation must be the official MEDLINE Title Abbreviation.
- NOTE: If you do not know any of this information, you will need to do a search in the **LOCATORplus** Tab.
- In the **Search Limits** section, the **My Library** criterion is a default selection. Notice the box is checked next to the selection. Nothing else needs to be selected in this section.
- Click on **Search**.

The screenshot shows the SERHOLD interface with two tabs: SERHOLD (selected) and LOCATORplus. The main section is titled "Bibliographic Search/Update/Add". It contains input fields for "NLM Unique ID:", "ISSN:", "OCLC Number:", and "Journal Title / Title Abbreviation:". The "Journal Title / Title Abbreviation:" field contains the text "jama". Below this is the "Search Limits" section, which includes checkboxes for "Region", "State/Province", "Library Group", and "My Library". The "AND" dropdown menu is set to "AND", and the "OR" dropdown menu is set to "OR". The "My Library" checkbox is checked. There is a "LookUp LIBID" button and a row of ten input fields for "Input LIBID (up to 10):". At the bottom, there are input fields for "Volume(s) Owned" and "Year(s) Owned", each with a "to" field. A row of buttons is at the bottom: "Search", "Reset Bib Search", "Reset Search Limits", "Reset All", and "Help".

- The **Reset Bib Search** button allows you to clear only the Bibliographic Search/Update/Add section.
- The **Reset Search Limits** button allows you to clear only the Search Limits section.
- The **Reset All** button allows you to clear the SERHOLD tab.
- The **Help** button opens in a separate window the SERHOLD portion of the Online DOCLINE Manual.

ADD HOLDINGS SCREEN

- The top portion of the screen is the title's bibliographic information.

The screenshot shows the 'Add Holdings' screen with the following fields:

- Title: JAMA : the journal of the American Medical Association.
- NLM Unique ID: 7581581
- ISSN: 0098-7484
- Publisher: American Medical Association
- Place of Publication: Chicago Ill

Below the bibliographic information, there are several sections:

- To add holdings, check the appropriate library or libraries:**
 - ☒ University Hospital (Test Record) (Austin, TX; LIBID: TXUXXE) [Demo]
- Retention Policy:**
 - ☐ Retained for a limited period (6)
 - ☒ Permanently retained (8)
- Physical Format:** Text (a)
- Completeness:** Information not available or Retention is limited (3)
- Commitment Level:** No special commitment to retain file (2)

On the right side, there is a section for **Acquisition Status:** with radio buttons for ☐ Currently receiving (4) and ☐ No longer acquiring (5). Below this is a table for **Holdings owned:** with columns for **Begin Volume/End Volume**, **Begin Year**, and **End Year**. The table is currently empty. Below the table are buttons: **Insert Row**, **Delete**, **Reset**, **Delete All**, and **Sort**.

At the bottom of the screen are buttons: **Add**, **Return to Search**, **Reset**, and **Help**.

CHECK APPROPRIATE LIBRARY

- This option allows those people with SERHOLD access to more than one library to select the correct library.
- Majority of libraries will only have only their library listed and checked. No action is required.

To add holdings, check the appropriate library or libraries
☒ University Hospital (Test Record) (Austin, TX; LIBID: TXUXXE) [Demo]

RETENTION POLICY

- Click on the radio button next to **Retained for a limited period** or **Permanently retained**.
- Retained for a limited period** means the title is held for a certain number of years back. Ex. last 10 years, last 5 years.

Retention Policy:
☒ Retained for a limited period (6) ☐ Permanently retained (8)

- When **Retained for a limited period** is selected, the right side of the Add Holdings Screen has the following **Holdings owned** choice:

The screenshot shows the 'Holdings owned' section with a **Latest** label and a text box containing the number '5'. To the right of the text box is a dropdown menu with three options: **Month**, **Year** (which is highlighted), and **Edition**.

- Type in the number of years, months or editions retained in the box next to **Latest**.

- **Permanently retained** means the policy is to retain all years of the title.

Retention Policy:

☐ Retained for a limited period (6) ☒ Permanently retained (8)

- When **Permanently retains is selected**, the right side of the Add Holdings Screen has the following add **Holdings owned** choice:

Acquisition Status:

☐ Currently receiving (4) ☐ No longer acquiring (5)

Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- First, select the Acquisition Status as either **Currently receiving** or **No longer acquiring**.
- **Currently receiving** means the library is still subscribing to the title.
- **No longer acquiring** means the title is no longer subscribing to the title.
- In the **Holdings owned** section, type in the volume number(s) and year(s).
- When a title is **Currently receiving**, you need to only enter the **Begin Volume** and the **Begin Year**. Leave **End Volume** and **End Year** blank.
- When a title is **No longer acquiring**, you need to enter both the **Begin Volume** and the **End Volume**, and the **Begin Year** and the **End Year**.
- The **Insert Row** button allows you to skip not owned or incomplete years in your holdings statement.
- The **Delete** button allows you to delete a row. NOTE: the cursor needs to be blinking in the row you want to delete.
- The **Reset** button lets you clear any changes made.
- The **Delete All** button deletes the entire holdings statement.
- The **Sort** button allows you to resort the order of the rows in chronological order.

Acquisition Status:

☒ Currently receiving (4) ☐ No longer acquiring (5)

Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
308	320	1983	1989
324	336	1991	1997
342		2000	

PHYSICAL FORMAT

- Select the physical format of the title.
- **Text (tu)** is the default choice.
- For electronic journal title, use **Computer file, remote (cr)**.
- For titles held in multiple formats, either create a holding record for each physical format, or use **Multiple physical forms (zm)**.

Physical Format:

Text (tu)

Text (tu)

Text, regular print (ta)

Text, large print (tb)

Text, Braille (tc)

Text, looseleaf (td)

Text, other (tz)

Videorecording (vu)

Videorecording, videocartridge (vc)

Videorecording, videodisc (vd)

Videorecording, videocassette (vf)

Videorecording, videoreel (vr)

COMPLETENESS

- Completeness requires you to estimate the amount of actual holdings you have. Of the years you retain, you need to consider how much is missing.
- The estimate should take missing issues and/or months into account. Entire missing years can be included in the holdings statement.

Completeness: Information not available or Retention is limited (0)

Commitment Level: Information not available or Retention is limited (0)

No special commitment (1)

Complete (95%-100% held) (1)

Incomplete (50%-94% held) (2)

Added/Modified: Very incomplete or scattered (Less than 50% held) (3)

COMMITMENT LEVEL

- Commitment level refers to any institutional policy to retain the title.
- Majority of libraries have **No special commitment to retain title (Z)**.

Commitment Level:

No special commitment to retain title (Z)

No special commitment to retain title (Z)

Will hold title for national commitment (N)

Will not cancel title without notifying resource libraries (R)

Will hold title for state commitment (S)

Will hold title for consortium/local commitment (C)

ADD BUTTON

- Click on Add when you have finished adding your title.

Add	Return to Search	Reset	Help
-----	------------------	-------	------

- You will receive a message saying a record was added.
- Click on *OK*.

Add Holdings

Title: JAMA : the journal of the American Medical Association
 NLM Unique ID: 7501160
 Publisher: American Medical Association

ISSN: 0098-7484
 Place of Publication: Chicago Ill

To add holdings, check the appropriate library or libraries:
☒ University Hospital (Test Record) (Austin, TX; LIBID: TXUXXE) [Demo]

Retention Policy:
☐ Retained for a limited period (6) ☒ Permanently retained (8)

Physical Format: Text (tu)

Completeness: Complete (95%-100% held) (1)

Commitment Level:
 No special commitment to retain title (2)

Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
308	320	1983	1989
324	336	1991	1997
342		2000	

Insert Row Delete Reset Delete All Sort

- Then you will see the following screen that shows your library's holding statement for the title.

Search Results
 1 record(s) found
 LIBID Status
 TXUXXE Demo

SERHOLD RECORD DISPLAY

Title: JAMA : the journal of the American Medical Association.
 NLM Unique ID: 7501160
 Publisher: American Medical Association
 Publication Date: 1968-
 Continuation Notes: Continues: Journal of the American Medical Association.

ISSN: 0098-7484
 Place of Publication: Chicago Ill
 Frequency: W

Owning Library: University Hospital (Test Record) (Austin, TX; LIBID: TXUXXE) [Demo]

Volumes Held: 308-320, 324-336, 342 -
 Years Held: 1983-1989, 1991-1997, 2000 -

Retention Policy: Permanently retained (8)
 Acquisition Status: Currently receiving (4)
 Physical Format: Text (tu)
 Completeness: Complete (95% or more) (1)
 Commitment Level: No special commitment to retain title (2)
 Encoding: 3

Update Delete Return to Search Help

SEARCHING LOCATORPLUS IN SERHOLD

- LOCATORplus is available as a searching tool to assist you in finding the correct serial title to add.
- You should use the LOCATORplus tab when you do not have any of the necessary bibliographic information.
- To search LOCATORplus, click on the **LOCATORplus** tab.
- Notice that LOCATORplus is imbedded in DOCLINE.
- The easiest way to search for a serial title is to remain in the Simple Search format and to switch to **Journal Title Search** in the Search In box.
- Click on **Search**.



- The Search Results screen lists potential titles.
- All the LOCATORplus functions are available, except the check box next to each individual title will not allow you to mark the title.
- To select the appropriate title, click on any of the title information: title name, dates of publication or ISSN.



- Now you are on the title's Bibliographic Information page.



- NOTE: the **Back to SERHOLD** button means that the title data has not been captured.



- Once you are on the title's Bibliographic Information screen, the button changes to **Return to SERHOLD Search**.



- Now the data has been captured and you can continue add the title as instructed under Adding Holdings to SERHOLD.



ADDING TITLES NOT IN LOCATORPLUS

- Every title in SERHOLD must be in LOCATORplus.
- To add titles not in LOCATORplus, a form must be mailed to NLM asking them to consider the title for inclusion in the catalog.
- NLM LOCATORplus Bibliographic Data Addition/Modification Form: http://www.nlm.nih.gov/tsd/serials/nlm_bib_add_mod_form.html.
- Remember: the title will have to be added to the catalog so it could be a long time before you hear back from NLM.

UPDATING SERHOLD

- To update an existing holding statement, remain in the **SERHOLD** Tab.
- In the **Bibliographic Search/Update/Add** section, enter the **NLM Unique ID**, the **ISSN**, the **OCLC Number**, or the **Journal Title** or **Title Abbreviation**
- Click on **Search**.

Bibliographic Search/Update/Add

NLM Unique ID: 0290562 ISSN: OCLC Number:

Journal Title: Title Abbreviation:

Search Limits

☐ Region ☒ AND ☐ State/Province ☒ AND ☐ Library Group ☒ OR ☐ My Library

☒ AND ☐ Input LEO (up to 10):

SEARCH RESULTS SCREEN

- The **SERHOLD RECORD DISPLAY** section is where the bibliographic information about the journal title is shown.
- Underneath the **SERHOLD RECORD DISPLAY** section is your institution's holding information for this title.
- To update the information, click on **Update**.

Search Results

1 record(s) found

LEAD Status

SERHOLD RECORD DISPLAY

Title: The New England journal of medicine

NLM Unique ID: 0290562 ISSN: 0098-9597

Publisher: Massachusetts Medical Society

Publication Date: 1800

Place of Publication: Boston, or

Continuation Notes: Continues the Boston medical and surgical journal

Current Library: University Hospital (East Boston) (Radio, TX; LEO: 100.000) [Update]

Volumes Held: 1

Serials Data: ISSN: 0290562

Previously known as: (0)

Acquisition Method: Directly acquiring (0)

Physical Format: Text file

Completeness: Other (partial portions, or, or outside of completeness) (0)

Continuation Level: No special commitment to retain file (0)

Encoding: 2

UPDATE SCREEN

- This is the screen where you will make your changes.

- It is similar same as the Add Holdings screen, except each updated title includes information on when it was added or last updated and the User ID of the person who did the updating.

Added/Modified: 01-30-2002 by EEX61
Encoding Level: 3

- It also shows the **Encoding Level** of the title.
- All titles in SERHOLD should be at Level 3 – the holding statement must include the amount held.
- Some titles that were converted into DOCLINE from the old system may be at Level 2 – no information on the amount held.
- All Level 2 titles must be updated to Level 3.

BUTTONS

- Click on **Update** when you have finished updating your changes.

- The **Add Different Format** button allows you to add another holding statement for the same serial title that is another format.

- You will add the new format following the same instructions for Adding Holdings to SERHOLD.

Add Holdings

Title: JAMA : the journal of the American Medical Association.

NLM Unique ID: 7581108

Publisher: American Medical Association

Publication Date: 1936

Place of Publication: Chicago IL

To add holdings, check the appropriate library or libraries:
☐ University Hospital (Text)
☐ Report (Avalis, TX; USD: TXUCX02) [Delete]

Retention Policy:
☐ Retained for a limited period (R) ☒ Permanently retained (P)

Physical Format: Text (t)

Completeness: Informational available as Publication is limited (L)

Consentment Level: No special commitment to retain title (C)

Acquisition Status:
☐ Currently receiving (R) ☐ No longer acquiring (N)

Holdings record:
☐ Newly received and entered ☐ Import from ☐ Add Date

[Insert Flow] [Delete] [Print] [Delete All] [Save]

[Add] [Return to Search] [Reset] [Help]

DELETING A TITLE FROM SERHOLD

- To delete a title from your SERHOLD holdings, click on the **Delete** button on the SERHOLD Search Results screen.
- A message asking you to either accept the deletion or to cancel it comes up.
- Click on *OK*.

Microsoft Internet Explorer

Click OK to delete the holdings record for TXUCX02. Click CANCEL to return to the holdings record without deleting.

[OK] [Cancel]

Below the dialog box, the following details are visible:
 Volumes Held: 300-320, 324-336, 342 -
 Years Held: 1983-1989, 1991-1997, 2000 -
 Retention Policy: Permanently retained (P)
 Acquisition Status: Currently receiving (R)
 Physical Format: Text (t)
 Completeness: Complete [95% or more] (C)
 Consentment Level: No special commitment to retain title (C)
 Encoding: 3

[Update] [Delete] [Return to Search] [Help]

- After receiving the message that a record was deleted, you return to the SERHOLD **Search/Update/Add** screen.

SERHOLD RECORD DISPLAY

Title: JAMA : the journal of the American Medical Association.

NLM Unique ID: 7581108

Publisher: American Medical Association

Publication Date: 1936

Place of Publication: Chicago IL

Frequency: w

Continuation Notes: Can

Library: University Hospital (Text)

Report (Avalis, TX; USD: TXUCX02) [Delete]

Volumes Held: 300-320, 324-336, 342 -

Years Held: 1983-1989, 1991-1997, 2000 -

Retention Policy: Permanently retained (P)

Acquisition Status: Currently receiving (R)

Physical Format: Text (t)

Completeness: Complete [95% or more] (C)

Consentment Level: No special commitment to retain title (C)

Encoding: 3

[Update] [Delete] [Return to Search] [Help]

SEARCH/VIEW

- Under the SERHOLD module, click on **Search/View** when you need to find a library that holds a particular title.
- This function is used in ILL when a request is needed in a rush, or when the title is difficult to find.

DOCLINE®
Library Item Cataloging and Referral System

SEARCH/UPDATE/ADD SEARCH/VIEW REPORTS
Logoff TRIMME

SERHOLD
Bibliographic Search/View

NLM Unique ID: [] ISSN: [] OCLC Number: []
Journal Title / Title Abbreviation: []

Search Limits

☐ Region ☐ AND ☐ State/Province ☐ AND ☐ Library Group ☐ OR ☐ My Library

☐ AND ☐ Input LIBID (up to 10): [] [] [] [] [] [] [] [] [] []
Lookup LIBID

Volume(s) Owned [] to [] Year(s) Owned [] to []

Search Reset Bib Search Reset Search Limits Reset All Help

- The **Search/View** screen is similar to the **Search/Update/Add** screen except the **My Library** option is not already selected.
- In the **Bibliographic Search/View** section, type in the information you have – **NLM Unique ID, ISSN, OCLC Number, or Journal Title or Title Abbreviation.**
- In the **Search Limits** section, you select the appropriate options to narrow your search.
- The best search strategy is to begin the search in a narrow area and gradually expand to a region or regions if necessary. Notice that there are Boolean dropdown boxes that are available to create your search strategy.

Search Limits

☐ Region ☐ AND ☐ State/Province ☐ AND ☐ Library Group ☐ OR ☐ My Library

☐ AND ☐ Input LIBID (up to 10): [] [] [] [] [] [] [] [] [] []
Lookup LIBID

Volume(s) Owned [] to [] Year(s) Owned [] to []

MY LIBRARY

- The **My Library** option is not often necessary for searching.

☐ OR ☐ My Library

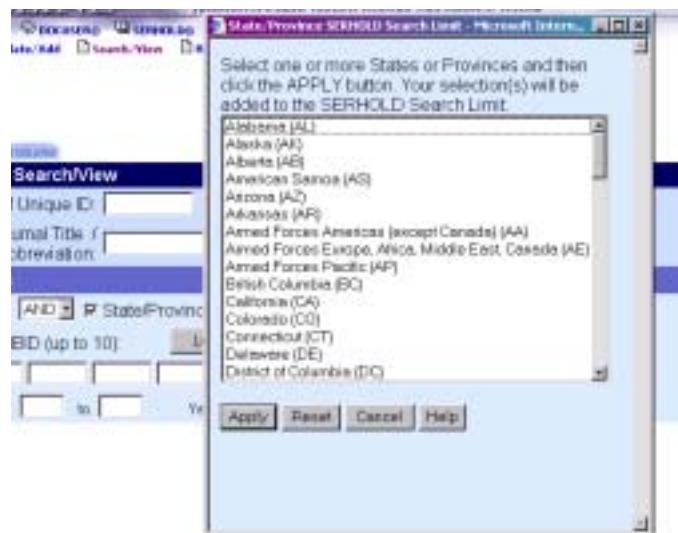
LIBRARY GROUP

- Click in the check box next to **Library Group**.
- Library groups are 11 or more related libraries.
- A window opens with all of the library groups available in DOCLINE.
- Click on the group you want to search. To select more than one group, you must hold down the Control (Ctrl) button on your keyboard while clicking on the groups. This is called Control + Click.
- Notice the first group listed is **My Routing Table**. By selecting this group, you can search the holdings of libraries you already have a connection with.
- Once you have selected the groups you wish to search, click on **Apply**.



STATE/PROVINCE

- To search an entire state or states, click on the check box next to **State/Province**.
- A window opens listing the states and provinces.
- Click on the state or Control + Click on multiple states.
- Click on **Apply**.



REGION

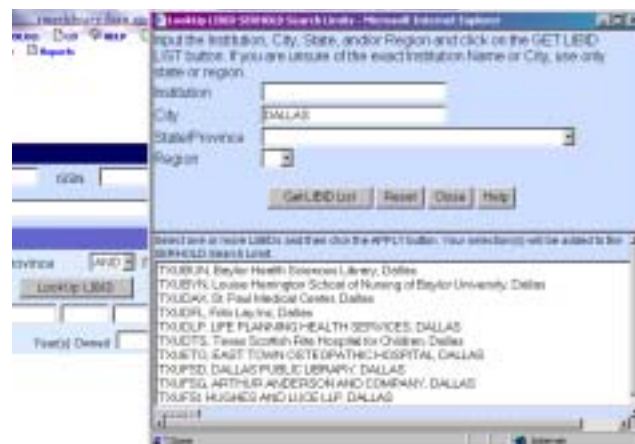
- Click the check box next to Region to search an entire region or regions.
- A window opens listing the NN/LM regions. Click or Control + Click to select the appropriate region(s).
- Click on **Apply**.



LookUp LIBID

- Up to 10 libraries can be individually searched.
- If you know the LIBIDs of the libraries, type them in to the boxes
- If you do not know the LIBIDs, click on the **LookUp LIBID** button.

- A window opens allowing you to search for the library by the institution name, city, state and/or region.
- Note: Not all the institutions found in the results have holdings in SERHOLD or are DOCLINE participants.



- Once all the criteria have been selected, click on **Search**.

SERHOLD Bibliographic Search/View

NLM Unique ID: ISSN: OCLC Number:

Journal Title / Title Abbreviation:

Search Limits

☐ Region ☐ AND ☐ State/Province ☐ AND ☐ Library Group ☐ OR ☐ My Library

☐ AND ☐ Input LIBID (up to 10)

Volume(s) Owned: to Year(s) Owned: to

SEARCH RESULTS SCREEN

- Listed near the top left hand are your search criteria and limits.
- The blue menu bar lists all the institutions that match your search strategy. They are listed in alphabetical order by LIBID.
- Notice in the column called **Status**, it will list if the library is inactive for some reason. Another often seen status is Demo or demonstration libraries.
- The right hand side shows the **SERHOLD Record Display**.
- Underneath the Record Display is the holding information for the first library listed in the **Search Results**.
- To view on the holding information for another library, click on the LIBID for that library.

Search criteria: 7501160 (NLM UNIQUE ID); jama (TITLE)

Search limits in effect: AR (STATE/PROVINCE) 1991 (HOLDING YEAR)

Search Results

14 record(s) found

LIBID	Status
ARUACH	
ARUARK	
ARURPT	
ARURHE	
ARURLD	
ARURFAA	
ARURSA	
ARURNM	
ARURSE	
ARURBA	
ARURGD	inactive
ARURWA	
ARURCA	
ARURSN	

SERHOLD RECORD DISPLAY

Title: JAMA : the journal of the American Medical Association.

NLM Unique ID: 7501160 ISSN: 0098-7488

Publisher: American Medical Association Place of Publication: Chicago IL

Publication Date: 1998- Frequency: w

Continuation Notes: Continuar: Journal of the American Medical Association.

Ownning Library: ARKANSAS CHILDRENS HOSPITAL (LITTLE ROCK, AR; LIBID: ARUACH)

Volumes Held: 263 -

Years Held: 1998 -

Retention Policy: Permanently retained (2)

Acquisition Status: Currently receiving (4)

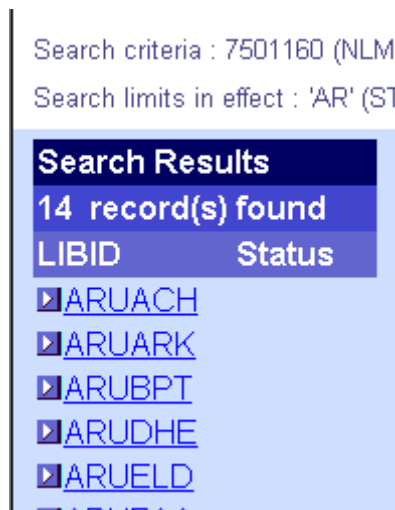
Physical Format: Text (14)

Completeness: Other (limited retention; or, no estimate of completeness) (0)

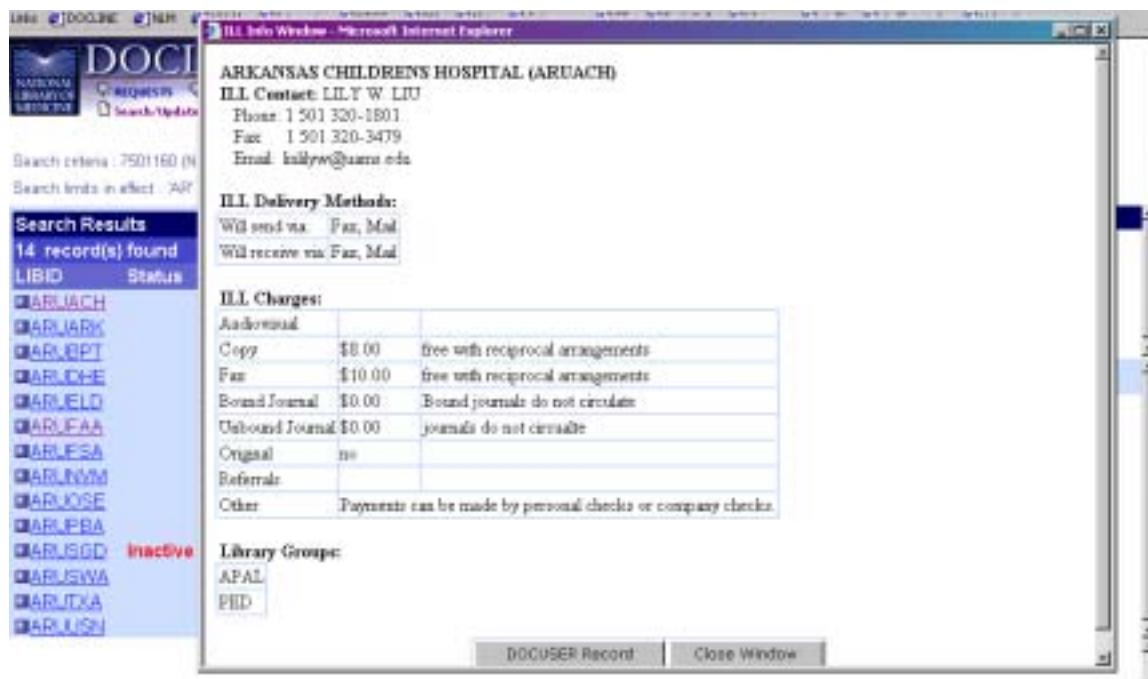
Consentment Level: No special commitment to return title (2)

Excluding Level: 3

- Next to each LIBID in the Search Results is a small arrow in a blue box.
- By clicking on this you are able to link to the DOCUSER information for this selected library.



- The DOCUSER ILL information opens in a separate window.
- By clicking on the **DOCUSER Record** button, you can view the library's complete DOCUSER record.



SERHOLD REPORTS

- By clicking on Reports in the SERHOLD module, you access all the SERHOLD reports available to you.
- **Submit Reports** are those reports that must be submitted to NLM so they can be created.
- Usually the reports are available the next day.



HOLDINGS BY LIBRARY

- The most requested report is the **Holdings by Library**.
- Click on the report name to get the Request form.
- First select the **Report Format Type** – **Standard** or **Delimited**. (A description of each format will be discussed later in this section.)
- If a User ID has the right to access more than one library, you will need to select the LIBID. Most User IDs can only access one LIBID.
- The **Select Reports Fields** section allows you to create a report with the selected fields include. Holding information, the library name, the NLM Unique ID and the journal title are automatically included in each report.
- To added additional fields, use Ctrl + Click.
- Once you've made your selections, click on **Submit Report**.

A screenshot of the "Holdings By Library" report request form. The form has a title bar "Holdings By Library" and a window title "BEX01". It is divided into three main sections: "Report Format Type", "Select LIBID", and "Select Report Fields". The "Report Format Type" section has two radio buttons: "Standard" (selected) and "Delimited". Below these are checkboxes for "Field Delimiter" and "Text Delimiter", and a section for "First row consists of field names" with "Yes" and "No" options. The "Select LIBID" section has a dropdown menu showing "T14002". The "Select Report Fields" section has a list of fields: "Acquisition Dates", "City", "Consentment Level", "Completeness", "Construction Notes", "Date Added/Modified", "Encoding Level", "Frequency", "Holding(s)", "ISSN", "Library Name", "NLM Unique ID", "OLC Number", "Physical Format", "Place of Publication", "Publication Date", "Publisher", "Retention Policy", "State/Province", "Title", "Title Abbreviation", and "Update ID". At the bottom of the form are three buttons: "Submit Report", "Reset", and "Help".

OTHER SUBMITTED REPORTS

- The other **Submit Reports** have similar Request forms. In most cases, you need to only click on the **Submit Report** button.
- The **Holdings Not Updated within One Year** report can be used to find titles that need to be updated yearly.

The screenshot shows a web form titled "Holdings Not Updated within One Year" with the identifier "EEX61" in the top right corner. Below the title is a header row with four columns: "LIBID", "Library Group", "Region", and "State/Province". Under the "LIBID" and "State/Province" columns, there are dropdown menus with "-None-" and "TXLUXE" selected. Below the form fields, there are three buttons: "Submit Report", "Reset", and "Help".

- The **Holdings Outside Publication Date** report allows you to find those holding statements with incorrect data.

The screenshot shows a web form titled "Holdings Outside of Publication Date" with the identifier "EEX61" in the top right corner. Below the title is a header row with four columns: "LIBID", "Library Group", "Region", and "State/Province". Under the "LIBID" and "State/Province" columns, there are dropdown menus with "-None-" and "TXLUXE" selected. Below the form fields, there are three buttons: "Submit Report", "Reset", and "Help".

- The **Level 2 Holdings** report allows you to find those holdings statements that need to be updated to Level 3.

The screenshot shows a web form titled "Level 2 Holdings" with the identifier "EEX61" in the top right corner. Below the title is a header row with four columns: "LIBID", "Library Group", "Region", and "State/Province". Under the "LIBID" and "State/Province" columns, there are dropdown menus with "-None-" and "TXLUXE" selected. Below the form fields, there are three buttons: "Submit Report", "Reset", and "Help".

- The **NLM Serial Title Changes** report gives you the new records created by NLM but have not been updated by the library.
- The new records are usually those that have had the title changed.
- You can select to receive the new records for the last month, 3 months, or 6 months.

The screenshot shows a web form titled "NLM Serial Title Changes" with the identifier "EEX61" in the top right corner. Below the title is a section titled "Select date range for the title changes" with three radio button options: "Last 1 month", "Last 3 months" (which is selected), and "Last 6 months". Below this section is a header row with four columns: "LIBID", "Library Group", "Region", and "State/Province". Under the "LIBID" and "State/Province" columns, there are dropdown menus with "-None-" and "TXLUXE" selected. Below the form fields, there are three buttons: "Submit Report", "Reset", and "Help".

REPORTS SUBMITTED

- If it is necessary to cancel or view the status of the submitted report, click on **Review/Cancel Submitted Report(s)**.
- To cancel, click in the check box under the **Cancel** column and click on **Cancel Selected Report(s)**.
- The status of the report is in the last column, **Status**.

Cancel	Report Name	Request Date	Status
<input type="checkbox"/>	Holdings for Library TXUXXE	01-24-2002	Pending
<div>Cancel Selected Report(s) Help</div>			

- Most reports are available by the next working day.
- A message will appear on the **Welcome Screen** when the report is ready.
- Click on the message to get to the report.

Messages for TXUXXE University Hospital (Test Record)	
No messages	
1	SERHOLD Report(s) Ready

- Then click on the report name you wish to view.
- To delete a report, click in the check box next to the report name and click on the **Delete Selected Report(s)** button.
- Reports will remain available in **SERHOLD Reports** for one week.

DELETE	REPORT NAME	REQUEST DATE	LAST VIEW DATE	NUMBER RECORDS
<input type="checkbox"/>	Holdings for UNIVERSITY HOSPITAL (TEST RECORD), Austin, TX as of 01-26-2002	01-26-2002	01-30-2002	12
<input type="checkbox"/>	Holdings for UNIVERSITY HOSPITAL (TEST RECORD), Austin, TX as of 01-25-2002	01-25-2002	01-25-2002	12
<div>Delete Selected Report(s) Help</div>				

UNION LISTS

- Quarterly NLM creates union lists for states and library groups.
- Under the **Union List** section you will have each Library Group and your state listed.
- The **Union Lists** are available in standard and delimited formats.

Union Lists	EEX61
State/Province	Number of Records
Holdings for Texas as of 11-03-2001	54658
Delimited Format Holdings for Texas as of 11-03-2001	54658

STANDARD AND DELIMITED REPORTS

- A delimited report will be separated by a character, for example, in this case a comma.
- The advantage of delimited reports is that they can be easily transferred into Microsoft Excel to be individualized.

```
Library Name, City, State/Province, LIBID, NLM Unique ID, OCLC Number, ISSN, Title, Title Abbrev, Publish
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "0045335", "01461263", "0065-3411", "Adva
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "0372433", "01482124", "0003-987X", "Arch
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "7701401", "02776215", "0145-7217", "The
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "7501160", "01124917", "0098-7484", "JAMA
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "9885967", "19225114", "1042-8224", "Jour
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "0404243", "01782301", "0022-3166", "The
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "0375410", "01754720", "0022-3476", "The
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "7503061", "01083209", "0002-8223", "Jour
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "2985213R", "01755507", "0140-6736", "Lay
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "8610688", "12616375", "0885-3185", "Move
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "0401060", "01713610", "0028-3878", "Neur
"University Hospital (Test Record)", "Austin", "TX", "TXUXXE", "0255562", "01587974", "0028-4793", "The
```

- Standard reports are already formatted.
- The advantage of standard reports is that they can be easily printed or transferred to Microsoft Word.

Holdings for UNIVERSITY HOSPITAL (TEST RECORD), Austin, TX as of 01-26-2002	
Advances in surgery.	
NLM Unique ID: 0045335	
Holdings: 1994-	
Archives of dermatology.	
NLM Unique ID: 0372433	
Holdings: Latest 2 years	
The Diabetes educator.	
NLM Unique ID: 7701401	
Holdings: Latest 2 years	
JAMA : the journal of the American Medical Association.	
NLM Unique ID: 7501160	
Holdings: 308-320,324-336,342- 1983-1989,1991-1997,2000-	

PRINTING REPORTS

- The way to print a report depends on the browser used.
- For Netscape:
 - (1) Click on the browser print button.
- For Internet Explorer:
 - (1) Move your cursor over any of the report information and then right click your mouse.
 - (2) Click on the Select All option.
 - (3) Right click.
 - (4) Click on the Copy option.
 - (5) Open a word processing package.
 - (6) Use the word processing package to paste the data and then to print the data.

SAVING DELIMITED REPORTS

- The way to save a delimited report depends on the browser used.
- For Netscape:
 - (1) Click on the Report Name hyperlink.
 - (2) Select File from the browser bar.
 - (3) Select Save As.
 - (4) Enter a file name with file extension ".txt". Example: report.txt.
 - (5) Click SAVE.
- For Internet Explorer:
 - (1) Right Click on the Report Name hyperlink.
 - (2) Click on the "Save Target As" option.
 - (3) Enter a file name. Example: Holding Report.
 - (4) Click on the drop-down list for Save As Type and select "Text File (.txt)."
 - (5) Click SAVE.